

## TaxCoach™: Business-Building Consultation Questionnaire

Welcome to TaxCoach™! Please fax this form to 513/297-0787 so that we can make the most of your consultation, and we'll contact you to set up a time for the call. Thanks!

### Your Designations:

- CPA
- EA
- Masters/Taxation
- MBA
- JD/LLM
- CFP
- CLU
- ChFC
- \_\_\_\_\_

### Your Services:

- Tax preparation
- Tax planning
- Financial planning
- Investment management
- Retirement planning
- College funding
- Estate planning
- Insurance planning/sales
- Employee benefit planning
- \_\_\_\_\_

### Your Income Sources:

- Hourly fees
- Project fees
- Asset management fees
- Commissions
- \_\_\_\_\_

### Your TaxCoach™ Goals:

- Improved technical knowledge
- Generate year-round fees
- Generate additional clients
- Improve overall marketing
- \_\_\_\_\_

### Your Practice:

Name: \_\_\_\_\_

Firm: \_\_\_\_\_

City & State: \_\_\_\_\_

Phone: \_\_\_\_\_

Firm Website: \_\_\_\_\_

What are your current target markets?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Do you plan to target new markets? If so, what markets?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How do you currently reach your prospects?

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\_\_\_\_\_  
\_\_\_\_\_

How did you first learn about TaxCoach™ Software?

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\_\_\_\_\_  
\_\_\_\_\_

What convinced you to give TaxCoach™ a try?

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\_\_\_\_\_  
\_\_\_\_\_

How can we help you make the most of your membership?

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\_\_\_\_\_  
\_\_\_\_\_